



STATE OF CALIFORNIA
Franchise Tax Board

Customer Experience

Management Development Program Project



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Customer Experience Project
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Agenda

- Customer Experience (CX) Defined
- Benefits to Customers and California
- Management Development Program (MDP) Project
- Co-Creation Process
- Findings and Recommendations
- Other FTB CX Efforts

Customer Experience – What is it?

- Customer Experience is how customers perceive their interactions with an organization.
 - Interactions is defined as any time you and your customers have a two-way exchange.
 - Good CX happens when customers think an interaction was:
 - **Effective** – met a need
 - **Easy** – fast, intuitive, simple
 - **Emotion** – felt heard, respected, confident

Customer Experience – What is it?

Customer's feelings about:

- Quality of Product
- Competitive Pricing
- Superfast Delivery
- Ability to Track Delivery
- Return Policy
- Customer Service



Customer Experience – What is it?

FTB Customers judge CX by:

- Easy to understand instructions
- Easy to File Tax Return
- Timely Refunds
- Clear notices
- Self Service Options
- Great Customer Service



Who Benefits from CX?

Taxpayers

- Confidence / Trust
- Ease of interactions
- Timely information / assistance

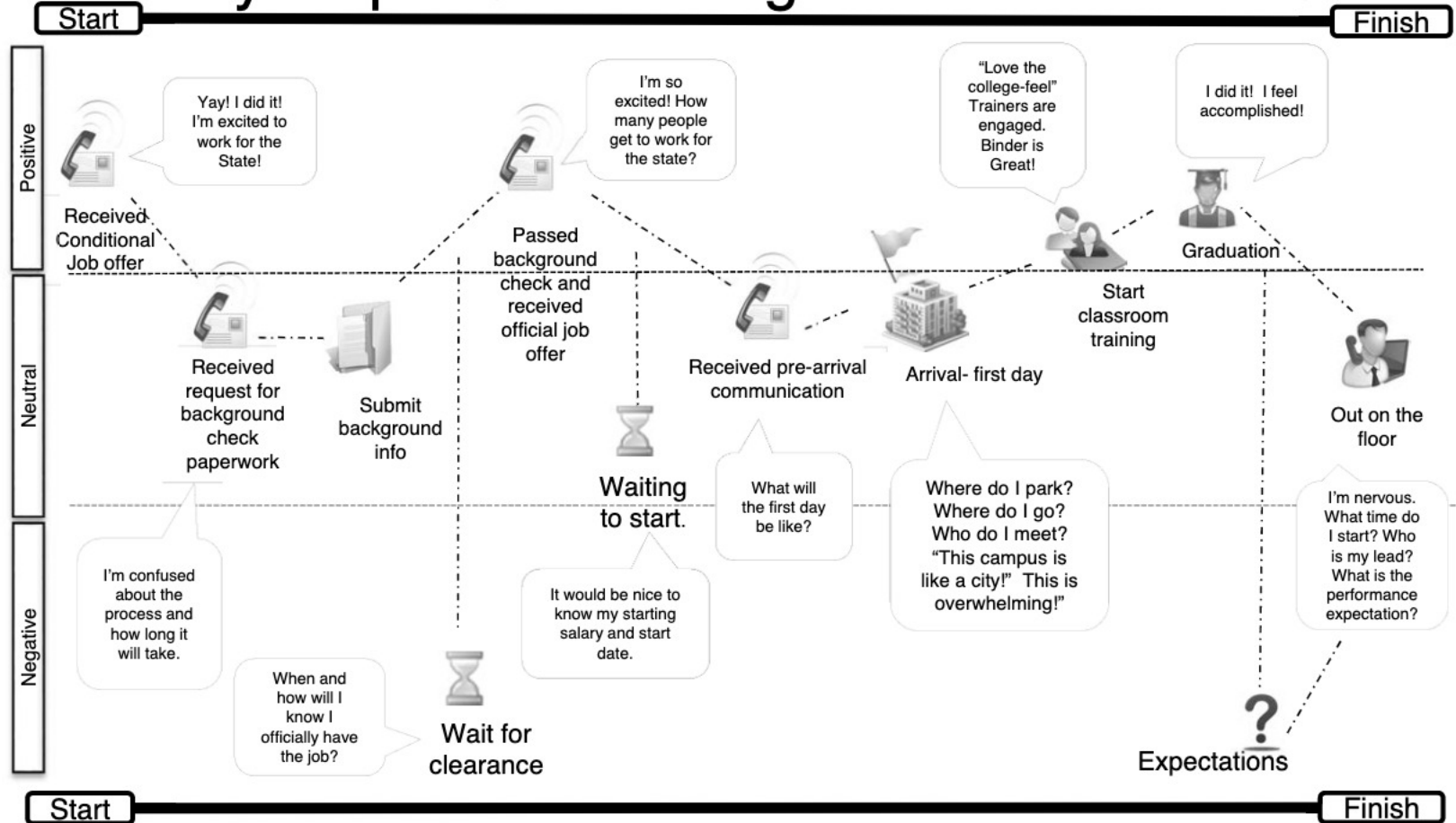
FTB

- Savings and Efficiencies
- Increased Compliance
- Increased Use of Self-Service Options

MDP Project Assignment

- Learn CX Principles and Co-Creation Process
- Apply Co-Creation Activities to On-Boarding Process'
- Validate Co-Creation Tool

Journey Map – Onboarding Process Current State



Findings and Recommendations

Touch Points:

- Conditional Job Offer
- Background Check
- Official Job Offer
- First Day Arrival
- Training
- Graduation
- First 30 Days on the Job

Findings and Recommendations

Touch Point #2: Background Check

Sam's Insights

- ✓ Nervous
- ✓ Unsure
- ✓ Apprehensive
- ✓ Anxious
- ✓ Confused



Findings

- ❖ Eager to Complete
- ❖ Empathetic & Helpful Staff

Opportunities

- ❖ Status Update
- ❖ Expectations Re: Timeline

Findings and Recommendations

Touch Point #3: Official Job Offer

Sam's Insights

- ✓ Excited
- ✓ Grateful
- ✓ Relieved
- ✓ Uncertain
- ✓ Anxious



Findings

- ❖ Personalized Phone Call

Opportunities

- ❖ Provide Written Job Offer
- ❖ Pre-arrival Letter

Findings and Recommendations

Touch Point #4: Arrive at FTB

Sam's Insights

- ✓ Welcomed
- ✓ Encouraged
- ✓ Excited
- ✓ Disoriented
- ✓ Overwhelmed



Findings

- ❖ Exec. Mgmt. Welcome

Opportunity

- ❖ Tour of Campus
- ❖ Meet Supervisors
- ❖ Access to Personnel Specialist

Findings and Recommendations

The Value of Co-Creation:

- Focus on Emotion
- Journey Oriented
- “Outside-In Perspective”

Other FTB CX Efforts

- CX Education and Awareness
- Additional Co-Creation Efforts
 - Audit “Pathways” Curriculum
 - IT Enterprise Intake Process
 - Customer Service Representative Training and Retention
- Build CX into EDR²

Questions?



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